



### **Financial Planner**

*Responsible for supporting senior advisers and serving client relationships*

- Entry-level position providing a great training ground for new college graduates or those with 1-2 years' experience.
- Work closely with primary adviser to understand client goals, enter client data, conduct financial analysis and write recommendations for financial plans. Training will be provided to increase the readiness level for these tasks, with the short-term goal for the financial planner to be involved with the entire financial planning process, including:
  - Participate in the data collection process
  - Input information into financial planning software
  - Perform detailed document reviews; analyze client information and situation across the financial planning spectrum to develop plan
  - Research information as necessary on a case-by-case basis
  - Write customized financial plan observations and recommendations for each client case
- Prepare notes/files for meetings with existing and new clients
- Prepare, coordinate and follow through on any needed communication with new or existing clients
- Assists with following up with new client on-boarding process
- Participate in investment strategy committee meetings and conduct investment research
- Tax research and tax return preparation, with training provided

### **Desired Skills & Experience**

- Bachelor's Degree with major in either Finance, Economics, Financial Planning, or Accounting
- Entry level position
- Must have a desire to obtain a Certified Financial Planner designation or preparing to enter a CFP® program
- Have a theoretical understanding of the financial markets
- Be able to work independently, but also able to function in a team environment when the situation dictates
- Ability to manage competing priorities in a timely fashion
- Strong attention to detail and systematic follow-through with prospects and clients
- Ability to communicate information in a clear, concise, and professional manner

### **Benefits:**

- Salary with opportunity for bonus
- Career track with opportunities for advancement
- 100% employer-paid health and dental insurance plus access to our cafeteria plan
- Retirement plan, 401(k)
- Paid holidays and vacation
- Mentorship and learning opportunities
- Paid professional memberships, paid continuing professional education and conferences

**Qualified candidates should submit their resumes to Julie Waitman, via email, at [Julie@verusfp.com](mailto:Julie@verusfp.com).**